

# Texas LibPAS Reports Presentation Notes

## November 6, 2013

### **Slide 1. Welcome message.**

This afternoon we are going to be taking a look at the reporting functionality of the Texas LibPAS website. LibPAS is from a vendor called Counting Opinions, so you may hear me use each of the terms but I'm talking about the same thing.

The reporting function of LibPAS is good and I anticipate that as more states begin to use it to collect the national statistics each year that it will continue to improve. We can also make recommendations to Counting Opinions on what we'd like to see, or what the libraries would find useful, so if you have suggestions let us know and we will pass that along.

You should have a couple of hand-outs that go along with today's presentation. I won't be addressing them directly but will be reviewing things that are in them. If you don't have them, no worries, they will be available after the webinar and I plan to post them on our webpage and on the Texas LibPAS homepage.

**Go to Slide 2.** LibPAS is where you go to input your library's data each year. You'll put in the same user name and password. If you don't have that, just send me an email and I'll be happy to send it to you.

**Go to Slide 3.** The picture you see on this slide is taken from the Graph/PI Overlay report.

There are 13 or 14 different types of reports available, but we are only going to review 7 of them here today. These are the reports that I think are the most useful.

The handout titled "Reports HelpCO" has a description and some instructions for each type of report available. That handout includes all of the different types of reports available, not just the ones we'll look at today.

You can experiment on your own, or ask for our help, if you need it. The goal for today is just to show you the existing reports you can access and help you customize some of the reports, based on what libraries ask us to provide them.

I'll also show you just a bit about the Report Options and filtering. There are also some details in the handouts.

**Go to Slide 4.** I'll also show you some reports that we here at the State Library have set up as templates and demo reports. Then I'll show you how you can customize those reports.

**Go to Slide 5.** Here are a few examples of what you could use the reports for. There are many others, depending on your library/community and what you want to do with the reports. Many libraries ask us for a report to use in their budgeting process. Often, this will include comparisons with other libraries

either in the state, their pop range, or region. You can also use these as you complete the annual report.

One thing to keep in mind is that your annual report doesn't have to be submitted for the data to show up in the reports. You can use the report function to check for data that looks odd when compared to the previous year.

**Go to TSLAC Statistics webpage.** Before we look at the LibPAS website, let's take a look at a couple of reports that we have set up in LibPAS and published on our website.

<https://www.tsl.state.tx.us/landing/statistics.html>

**Go to Texas LibPAS.** <http://tx.countingopinions.com>

You will use the same login and password that you used when you completed the annual report.

Remember, these are not case-sensitive and I am happy to provide those to you. Contact information is on the last slide of the presentation.

I'm using Ethel L Whipple Memorial Library's account for this demonstration. That way, what you see on the screen today is similar to what you will see when you log in. There are also multiple libraries in Cameron County, so you can better see how the reports run on a county-basis.

Before we look at the reports, I want to make sure you know that you cannot change data from the reports. That can only be done during the annual reporting process in "Data Input" and all of your data is now locked. So you really can't make any errors here. If the report isn't set up quite right, you just won't see the results you thought you would. Remember, the reports take a little practice and some trial and error. Don't be afraid of it. Valicia, our Library Statistics Specialist and I are happy to help you and since we can access each of your accounts, we can actually go in and see the report to help you troubleshoot.

Now, I'm going to click on the Reports link at the top of the page and that will take us to the Manage Reports page. That is the "homepage" for reports. You'll see several tabs on this page, plus some links.

Now, we're going to go through some of the reports available. I'll show you a couple of canned reports and then some of the reports we have set up for you. I'll also create a custom report using one of the templates we have set up. We'll alter it with filters so you can see how that works, as well.

You'll find that some reports and some graphs are better than others. Experiment and find what works for your needs.

The first 2 reports are permanent links from this page and you don't need to create them. I think of them as "canned" reports. You can't really change them. These are library trend and ranking report.

These 2 reports are based only on your library's data.

Let's click on the **Library Trend report**.

You'll see PI referenced in all of these reports. That stands for Performance Indicator. It's just another phrase for data element, which is another phrase for the questions in the annual report.

Text PIs are those questions that have text responses, such as library name and address. You probably will not want to see those for most of these reports, which is why the default is unchecked. If you click on it and get those, just unclick it and Reload the report. It's not anything permanent. In addition to the questions asked on the annual report, the reports here include various measures and percentages, based on the annual report, such as Circ per capita and the percentage of operating expenditures spent on Salaries and Wages, among others.

So, you'll notice that the default is for Texas Outlet Data. That is branch data. Most of the libraries don't have branches, and even if they do, the Texas Public Libraries Annual Report includes that data. So, for most of the reports, including this one, you will choose Texas Public Libraries Annual Report and the Period (this is the local fiscal year). You probably will never need to look at any of the data under IMLS. That is really for State Library staff to use for submitting some of the data to Census.

The default for period, which is the local fiscal year, is to compare all the years, back to 2006. You have to change the period if you want to compare only certain years. Let's first compare all of the years. "Groups" means the different sections of the annual report. You can filter it so you just expenditures, or collections, or library services. Let's look at all of it to begin with.

One nice feature is the graphs. If you want to graphically show one of your stakeholders how, say, salaries, or materials, have increased or decreased over time, it might be helpful to print out the related graphs. You will have to right-click on the graph, save the image to your computer, and then go in and print it out. You can't print it out straight from the report. Many of the other reports available to you also have graphs with them.

The light pink background represents the average of all the years' data. The red bars represent below the average and the blue bars represent above average. This is true in all of the reports.

There is also a spreadsheet function, so you can download just the data, including the percentage changes into excel. The graphs do not show up in the spreadsheet. We won't look at the spreadsheets today because they can take a while to download, but most of the reports available can be downloaded into a spreadsheet.

Keep in mind that the questions have also changed over the years, so some of the data will end and other data will begin. The change from Books and Serials to Books in Print is a good example. So, let's filter the groups for just the Collection data. Make sure you click on "reload."

You can still see the data, but if we've changed the definition or the question was dropped from the report, then it shows up in "Retired".

To leave this or any report, and get back to the report manager page, click on "Exit".

In the **Ranking Report**, again, pay attention to the collection that is pulled and the year. We'll look at 2012 today. You will want to choose the Texas Public Libraries Annual Report and the Period of 2012. You will also need to "reload" the report once you make the changes. Just leave the Level at State/Province. You don't need to change the Level or the Report Type.

The numbers in red with the pink background are your library's numbers. You can also download this report in excel, but keep in mind that the formatting will be lost, so your library's numbers will no longer be highlighted. The report is useful in comparing your library's data to the statewide minimum, average and maximum. As you can see, this library is in between the minimum and the average for most of the measures.

Like the other reports, you can also customize what section/sections you look at. If you just want to look at expenditures, you can isolate the report to Section 3. If you want to look at expenditures and maybe staffing levels, you can add Section 8 by holding the Control key down and clicking on Section 8. I'm not sure why it's adding the section after the one you choose. I'll have to get the vendor to look into that.

Let's exit and go back to the main reports page.

### **Merge Documents**

These are found in the TX folder. So click on that folder and then Merge Documents. We put together a couple of documents for you to use. They are called merge documents because we set up a word template and when uploaded, it merges with each library's data. Each report is specific to your library. Valicia sent each of the public library directors an email with instructions for accessing it. We have set up a customized report with your 2011 and 2012 data. These reports open in MS Word and they are customizable. Just save it to your computer and make your changes. If you don't like the changes you make, just download the original report again. This report has some simple measures that libraries can, hopefully, use with their stakeholders. If there are other measures that you would like to see included, or excluded, please let us know. We are very open to suggestions for improvement. We want the libraries to be able to use them.

### **Demo Reports**

The Demo Reports were set up when I did a similar webinar last year. They go with that presentation, but you can certainly use them. I tried to set up a template for each type of report available. If you look at the *ReportsHelpCO* handout, that also provides information on each type so you can look at those together. Some of the Report Templates are duplicated in the Demo Reports. If you want to change these reports, you'll need to save them first. We'll look at how you do that in the Report Templates.

### **Report Templates**

We've also set up some report templates for libraries to use. These are in the Local Folder and then Report Templates. When you open these reports, you'll notice the background is light blue. Let's look at Library Summary Report, which is a Table Report. The light blue background indicates this is a

template. You can run it in the template, but to make any changes, you will need to save it as a New Report. Once you do that, you can filter; change the questions, or even the report type. We are not going to run this as a template because it takes too long. So, let's save it as a new report and then filter it just for the Ethel Whipple Library in Los Fresnos.

I'm going to spend a fair amount of time in this report because it's the one type that I think you will use the most and I can demonstrate some of the filter functions here, as well.

When we Save as new report, the report saves in your local folder. It also includes the report name, based on the template name and shows that it was revised from the template and the date. You can change the report name, the description and the title. You can also change the report type and the report folder. Just remember to Save after you do so. Otherwise, once you run it and exit out, it will lose your changes.

Save after every change.

So, let's filter for Los Fresnos. Since I know the city name, I'll use my cursor to click in the gray box next to Street City. You can also use Mailing City. Or you can use Library Name. Whatever you want to use. We will click on the city name in the pop up box and then click on Update. Now, we will "save" the report and then "run" it.

To get rid of this filter, we'll go back in and choose "All" which will clear it and then we can filter on another criteria, such as county. We'll choose Cameron County and then "save" and "run" the report.

In addition to the sections we ask you to report in the Annual Report, there are other sections available to you that take the data elements and calculate them for you. Examples are Input Measures (Staff Per Capita, Video Materials per 1000, etc.), Key Ratios and Percentages, Output Measures (Reference, Circ per Capita, Programming numbers per Capita, ILL per capita), Service Level Measures (ILL per week, Circ per week, Ref per visit, per hour, per week), Efficiency Measures (Circ, Visits, Ref per FTE/Revenue-all sources per Cap), Financial and Collection Ratios and Percentages. They aren't saved in the template but you can add them. So let's add some. If you want to add more than one at a time, hold the "Ctrl" down and choose them, then click on "Add."

Let's also say that we don't want to see all of these questions and want to even delete some of them. Particularly the Branch data, since Los Fresnos doesn't have a branch. Can uncheck on the left hand side what don't want to see on graphs or in reports, but you can still filter by it. It's also faster. However, if you want to delete it altogether, then click the red X under "remove" on the right-hand side of the page. So, let's say we want to filter by population, but don't want to see it on the screen and that we want to delete Street Zip+4.

Let's also look at the report options. Please note that the 25<sup>th</sup> and 75<sup>th</sup> percentile options do not work. However, you could filter for those on each PI, or data element, which I'll show you in a minute. You can have this report add average/max/min/median. If you noticed, the table report included the annotations, or notes, that each library inputs to explain data irregularities. You can uncheck it and

those will disappear. So, let's try a couple of report options. Uncheck Notes and check Avg and see what happens. Make sure you save and then run. Average is at the bottom and when you look at the graphs, the pink shows where the average is. You have to scroll back all the way to the left and top to exit or go back to report settings.

Let's do a bit more to this report and then move on to some other types. Let's say that instead of libraries in Cameron County, you wanted to look at libraries in the South Texas area that have similar populations. This is where you can filter within the report settings. First, let's get rid of some of the data we don't need. Let's uncheck several of the general information questions so we don't have to scroll so much. It's also faster. We'll leave "region" in question 1.30. That's what used to be the system. We've kept those region designations. It's still a good way to look at the data regionally. We'll filter it to only look at South Texas. We'll get rid of the county filter first. Let's save. Then we can filter for population. Let's look at all libraries in South Texas region that are equal to or greater than Los Fresnos by 5%. We don't need to filter for Los Fresnos. This is their report, so it will be included. We can also leave the average. Then we will save and "run." So, what we got was just 1 other library, so we may need to put in a bit larger percent. Let's try 10%. Save, then run. That looks a bit better. We left in the average so that will show up when we look at the graphs. Fairly interesting results.

Let's exit out and then take a look at the other types of reports that we have as templates. The **Trend/PI** report is a year-to-year report. You'll just want to make sure you have the 2 years you want at the top. You can add or change the data you want to look at just like we did in the table report. We'll just do a quick save as new report and then filter by Cameron County so you can see it. The graph isn't particularly useful. If we include the population data, we could see what's throwing the data off. Of course, it's Brownsville. We could filter by city and leave out those with large populations and maybe get a bit more useful graph. So, we'll filter for La Feria, Laguna Vista, Port Isabel and Rio Hondo. First, take out the County filter. Then add the city filter. Hold the "ctrl" key to get them all, then click "update." Save, run and look at the graph. At least, it's more interesting visually, but there is a pretty large difference in what each of these libraries spends on collections.

Let's exit and look at another; **Trend Report**. This one is capable at looking across time periods. Save as a new report. Still looking just at one or two data elements at a time is best. We'll add a couple so you can see what it does with too many. Let's just filter by South Texas Region and see what happens. Notice we don't have anything checked except Total Circ. We want the option to filter but we only want to see Circ. So, now you have the individual data for each of those libraries. You can download into excel and see it all in one place. You can look at the graphs and see that the average is highlighted in pink, like many of the other reports. Not sure how helpful this one is. Let's add one more data element so you can see how that looks. Let's just use Library Visits. We often look at these two together. Save and Run. As you can see, Circ is at the top and then Visits. The data doesn't intersect, so I don't find it terribly useful, unless you filter it so you're only looking at a few libraries at a time.

Now let's exit and look at the **Period Comparison Report**. This report allows you to compare the results for two selected periods, not necessarily consecutive, and shows the results. It also shows the difference, or gap, between the two years. Let's start by saving as a new report and then filtering by

County and see what happens. Now this looks a bit more interesting except we don't really want to look at the library name, county, street or region in the report itself. We want the option to filter by those, but not see them in the results. Let's go to report settings, remove those, save and run again. That looks better. Notice it shows you the change between years, and there are lots of graph options. Plus, like all reports, it shows you what filters you're using, as well. Let's look at the graphs. So, some that we've seen before and then some we haven't.

Let's exit and look at one last report. It's kind of a fun report and visually very interesting. The **Graph/PI Overlay Report**. It allows you to filter by one data element and then overlay another one on a graph. Exit and then go back to report templates. This one looks at Square footage and library visits. Save as a new report so we can filter it. Let's filter by County, since I didn't include the region. Then we can add region and I'll show you quickly how to create a different type of report from here. So, filter for Cameron and run. Go back to Report Settings and let's say we want to look at the South Texas Region and use not square footage to compare visits, but collection size to see if there is a correlation. So, first let's get rid of the county filter and add Region to the report. Let's set up the filter for South Texas and save. Now, let's find Total Items and add it. Let's delete square footage and save. Now, let's add the overlay of visits. Find the question and click on Update Overlay. Let's save and run. Let's see if we can reverse the graph and get the larger ones on the top of the graph. Report settings and then click on the blue arrow to point it down. Save and run. There we go. This way it's easier to see the average and our example library.

Now, let's go back to Report Settings and I'll show you how easy it is to change this report. On Report Type, just choose which one you want. If you notice, the overlay option and the arrows are gone. Save and run. Not very useful. But it takes some experimentation. What works well in one report type doesn't in the other. The main issue here is that the library names are showing up. Easily fixed in Report Settings. Unclick those questions you don't want to see. Locations always shows up so you don't need to have city or library name checked off.

In looking at the Report Types, there are one or two you will probably not use. I find the cross-tabs report overly complicated both in set-up and in interpretation. The custom format report allows you to put in CSS code to brand the report with your library's logo, colors, etc. I only know enough CSS code to be dangerous, but some of you may have staff or IT that can work with it to customize the look of a table report. There are some descriptions of these reports in the handouts.

If we look at the reports tab now, you'll see all the reports we saved. Once you do this, you can re-run the reports. You can also easily change the report name, description and title to whatever you want them to be. You can also remove the reports and start over. Remove the reports.

**Ok, back to the Powerpoint. Go to Slide 6.** Just remember, you can't break anything. Don't be afraid of the reports. **Go to Slide 7.**